



# Treasury Acquisition Institute

Established 1993



**Fiscal Year 2007  
Catalog**



**Established 1993**

# **Fiscal Year 2007 Course Catalog**

INTERNET: <http://www.irs.gov/opportunities/procurement/>  
INTRANET: <http://awss.procurement.irs.gov/tai/index.htm>

**Treasury Acquisition Institute  
6009 Oxon Hill Road  
Oxon Hill, Maryland 20745**



Dear Treasury Acquisition Institute (TAI) Customer:

The TAI staff would like to thank you for your continued support. As our valued customer, we will continue to listen to your needs, provide you with professional service, and deliver high quality training solutions. We are committed to assisting you in your efforts to achieve outstanding performance and career success!

In 2005, The Office of Federal Procurement Policy (OFPP) issued Policy Letter 05-01 to address the development and professionalism of the federal acquisition workforce and support the Office of Management and Budget's (OMB) focus on human capital and financial management. The principal purposes of Policy Letter 05-01 are: 1) to define the acquisition workforce to include additional acquisition-related functions and create a multi-disciplined acquisition community, 2) to align the civilian (non-Department of Defense) and defense acquisition workforce training requirements, and 3) to emphasize the importance to federal managers and the workforce of continuous learning, to include training on critical subjects such as ethics, performance-based contracting, and other timely and topical areas.

The definition and the roles of the acquisition professional have changed. TAI is pleased to present this year's catalog with a variety of course offerings designed to meet the needs of the changing federal acquisition environment; to develop well-rounded, world-class acquisition professionals. These areas include:

- **Acquisition** – Mandatory 1102 series contracting courses and specialized contracting courses including Performance-Based Contracting, Earned Value Management, Strategic Sourcing and more;
- **Contracting Officer's Technical Representative;**
- **Project Management and IT Project Management;**
- **Business Analysis;** and
- **Personal Development.**

We welcome your continued input to our program and hope that you will let us know how we may better serve you. We look forward to seeing you at the TAI and continuing our partnership in helping you achieve your professional success.

Sincerely,

Nick Nayak, Chief Learning Officer  
Sylvia Ball, Assistant Program Manager  
Jodi Stark, Assistant Program Manager  
Shonda Yates, Business Operations Specialist  
Donald Guy, Business Operations Specialist  
Jerome Ellis, Business Operations Specialist  
Alan Monico, Jr., Contract Specialist  
Willie Mincey, Management Analyst

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## SECTION 1: PROGRAM OVERVIEW

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### The Institute's History

The Treasury Acquisition Institute (TAI) was established by the Department of the Treasury and the Internal Revenue Service in partnership with the other Treasury Bureaus on September 14, 1993. TAI was created to coordinate and lead Departmental and Bureau efforts to obtain the best training possible for their acquisition professionals. Since commencement, many other federal agencies and organizations have participated in the TAI training program.

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### Mission Statement

The current mission of TAI is to obtain cost-effective training solutions to ensure that all participating agencies and organizations receive the finest acquisition training to develop world-class acquisition professionals.

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### Agencies Served

- Architect of the Capitol
  - Architectural and Transportation Barriers Compliance Board
  - Bureau of Alcohol, Tobacco, and Firearms
  - Bureau of Engraving and Printing
  - Bureau of the Census
  - Bureau of the Public Debt
  - D.C. Department of Administrative Services
  - Department of Agriculture
  - Department of Army
  - Department of Commerce
  - Department of Homeland Security
  - Department of Justice
  - Department of Labor
  - Department of Navy
  - Environmental Protection Agency
  - Executive Office of the President
  - Federal Emergency Management Agency
  - Federal Law Enforcement Training Center
  - Federal Reserve Board
  - Federal Transit Administration
  - Financial Management Service
  - General Accounting Office
  - National Credit Union Administration
  - National Gallery of Art
  - National Oceanic and Atmospheric Administration
  - Office of the Comptroller of the Currency
  - Office of Thrift Supervision
  - Pension Benefit Guaranty Corporation
  - Small Agency Council
  - Treasury Departmental Offices
  - U.S. Coast Guard
  - U.S. Customs Service
  - U.S. Mint
  - U.S. Patent and Trademark Office
  - U.S. Secret Service
  - U.S. Securities and Exchange Commission
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### About Our Catalog

This Fiscal Year 2007 Training Catalog contains descriptions of courses in federal contracting, specialized contracting, business analysis, project management and personal development training. We offer results-oriented courses and a professional training environment. Clear and exciting presentations, practical examples and enriching course materials, all help to reinforce major teaching points. Our instructors encourage class discussion and participation to create an environment in which students can learn through sharing and evaluating their experiences.

## SECTION 2: GENERAL INFORMATION

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### TAI Staff Directory

|                               |                                     |                |
|-------------------------------|-------------------------------------|----------------|
| <b>Dr. Nick Nayak</b> .....   | Chief Learning Officer .....        | (202) 283-0983 |
| <b>Sylvia Ball</b> .....      | Assistant Program Manager.....      | (202) 283-1675 |
| <b>Jodi Stark</b> .....       | Assistant Program Manager.....      | (202) 283-6970 |
| <b>Shonda Yates</b> .....     | Business Operations Specialist..... | (202) 283-1372 |
| <b>Donald Guy</b> .....       | Business Operations Specialist..... | (202) 283-1292 |
| <b>Jerome Ellis</b> .....     | Business Operations Specialist..... | (202) 283-7036 |
| <b>Alan Moncio, Jr.</b> ..... | Contract Specialist .....           | (202) 283-1442 |
| <b>Willie Mincey</b> .....    | Management Analyst.....             | (202) 283-1422 |

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### Course Hours

All courses held at TAI in Oxon Hill start at 8:30 am and end at 4:00 pm unless otherwise noted on the registration confirmation.

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### How to Register

1. Complete the registration form on the last page of this catalog.
2. Please ensure that all items are completed.
3. Have your supervisor indicate approval to attend the training by signing the form.
4. Fax your completed registration form to 202-283-1130 or 202-283-1517.

If you have questions or need additional information, please call anyone on the TAI staff for assistance.

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### Registration Confirmation

You should receive a confirmation within five business days of receipt of your request. If you do not receive a fax or e-mail confirmation within five business days, please call anyone on the TAI staff for assistance. Individuals are responsible for making their own travel arrangements. However, no travel arrangements should be made until you receive your fax or e-mail confirmation of registration.

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### Withdrawal/Substitution/Cancellation Policies

1. If you are unable to attend a class for which you are confirmed, please send us a note with your supervisor's signature two weeks before the class start date (30 days for classes with pre-course work such as CON 120 and CON 353.) An email routed through your supervisor is another method of notifying us of a change.
2. If your office wishes to substitute a participant, the substitute participant must complete a registration form. Send us the registration form with a note indicating for whom the participant is substituting. Substitutions are allowed up to the class start date.
3. If TAI has to cancel a course for administrative reasons, we will make every effort to notify all confirmed participants. When we contact you, we will be happy to discuss enrolling you in a future session.

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## Waiting List

Because of the popularity of our program, many of our courses do fill quickly. When we notify you that the session you requested is full, please let us know if you are interested in being placed on the waiting list. If space becomes available we will contact you.

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## Dress Policy

The dress policy is casual business attire (no shorts). For your comfort we suggest you bring a jacket or sweater.

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## Reasonable Accommodations

If you have special needs, please contact TAI. We will make every effort to accommodate your request.

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## Attendance Policy

You are expected to attend all sessions of the course. If you have to be absent from any portion of the course, notify your supervisor, instructor, and a TAI staff member. Significant absences from the classroom may be reported to your supervisor and may result in your not receiving a certificate of completion.

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## Receiving Messages During Class

Messages for students attending class may be left with any member of the TAI staff. Students should check for messages during breaks on the bulletin board in the phone rooms (either on the 1<sup>st</sup> or 7<sup>th</sup> floors.)

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## Smoking Policy

Smoking is prohibited in the building. Smokers are asked to use the space provided in the rear courtyard.

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## Hotel Accommodations, Transportation and Parking

**Hotel Accommodations:** The local area around the training facility has limited and very modest accommodations. We find that most students and instructors prefer to stay in Alexandria, VA where there are numerous choices of hotels and restaurants. Below are a couple that have been recommended to us by students and instructors who have stayed there.

Hawthorn Suites, 420 Van Dorn Street, Alexandria, VA 22304  
Phone: (703) 370-1000 x7105, Reservations: (800) 527-1133  
[www.hawthorn.com](http://www.hawthorn.com)

Hampton Inn, 5821 Richmond Hwy, Alexandria, VA 22303  
Phone: (703) 329-1400  
[www.hamptoninnalexandria.com](http://www.hamptoninnalexandria.com)

## **Transportation**

**Metro Rail Service:** There is no metro rail service to the building. The nearest metro rail station is Branch Avenue Metro Station.

**Metro Bus Service:** The metro bus stops in front of the Constellation Centre Building. Information on the metro rail and metro bus system is available at <http://www.wmata.com>.

**Shuttle Bus Service:** Shuttle bus service is available from the Main IRS building to Oxon Hill and New Carrollton to Oxon Hill. Shuttle bus schedules are available at: <http://www.hq.irs.gov/programs/Shuttle/shuttleindex.htm>.

**Parking:** Free Parking is available in the front of the building.

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## **Directions to TAI:**

**From Virginia:** Take 495 North over the Woodrow Wilson Bridge (ending up on the Maryland side). Take **Exit 4A** to Oxon Hill. Stay in the right-hand lane, the building will be approximately ¼ mile on the right hand side just past the Oxon Hill Home Depot.

**From Maryland:** Take 495 South (staying on the Maryland side) towards Richmond/Alexandria. Take **Exit 4A** to Oxon Hill. Stay in the right-hand lane, the building will be approximately ¼ mile on the right hand side just past the Oxon Hill Home Depot.

**From Washington:** Take 295 South to 95 North towards Baltimore. Take **Exit 4A** to Oxon Hill. Stay in right-hand lane. The building will be approximately ¼ mile on right hand side just past the Oxon Hill Home Depot.

TAI is located on the 1<sup>st</sup> and 7<sup>th</sup> floors of the Constellation Centre Building. Training rooms 103, 104 and 110 are located on the 1<sup>st</sup> floor across from the Deli. Training rooms 725B and 726A are located on the 7<sup>th</sup> floor.



## SECTION 3: TREASURY TRAINING INFORMATION

### Training Information for Treasury 1102 Series Procurement Professionals

| GS-1102 Series Mandatory Training Requirements |  |  |
|--|--|--|
| Level  | Prior to FY04                                      | Current Training Requirements: FY06-FY07                               |
| 1  |  | *CON 100 – Shaping Smart Business Arrangements                         |
|  |  | CON 110 – Mission Support Planning                                     |
|  | CON 101 – Basics of Contracting                    | CON 111 – Mission Strategy Execution                                   |
|  |  | CON 112 – Mission Performance Assessment                               |
|  | CON 104 – Principles of Contract Pricing           | CON 120 – Mission Focused Contracting                                  |
|  | 1 Elective   | 1 Elective   |
| 2  | CON 202 – Intermediate Contracting                 | CON 202 – Intermediate Contracting                                     |
|  | CON 204 – Intermediate Contract Pricing            | CON 204 – Intermediate Contract Pricing                                |
|  | CON 210 – Government Contract Law                  | CON 210 – Government Contract Law                                      |
| 3  | **CON 301 - Executive Contracting                  | CON 353 – Advanced Business Solutions for Mission Support (after FY03) |
|  | **CON 333 - Management for Contracting Supervisors |  |
|  | 2 Electives  | 2 Electives  |

**Electives** - As agreed to by the supervisor, electives may be any training opportunities related to the employees job or necessary for career development or for cross training. Electives may include no-cost distance learning or other training opportunities, assignment-specific courses or other training opportunities funded by the student's organization.

\*CON 100 - Desired but not mandatory for employees who completed CON 101 and/or CON 104 before CON 100 was deployed in 2003.

\*\*If CON 333 was completed by 9/30/03, Level 3 is satisfied. If CON 301 was completed by 9/30/03, but not CON 333, then CON 353 must be taken.

### Additional Resources

Office of Personnel Management (OPM) GS-1102 Qualification Standards - <http://www.opm.gov/qualifications/sec-iv/b/gs1100/1102.htm>

Federal Acquisition Workforce Policies - <http://www.fai.gov/policies/policies.htm>

Includes:

- Federal Acquisition Certification in Contracting (FAC-C)
- Office of Federal Procurement Policy (OFPP) Letter 05-01

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## Training Information for Treasury Contracting Officer's Technical Representatives (COTRs)

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### **Department of the Treasury COTR Policy on Training**

DTAR 1001-670-2 states, "Contracting Officer's Technical Representative (COTR) training must consist of a basic acquisition course of at least 24 hours approved by the Bureau Chief Procurement Officer (BCPO) that includes pre-award, post-award, and procurement ethics training. Upon completion of the basic course, COTRs are required to complete at least 8 hours of maintenance training each year. Examples of COTR maintenance training include, but are not limited to, acquisition, technical, job-specific, or project management courses. "

The following are recommended sources for the **Basic COTR Training Course**:

- **Classroom-Based Basic COTR Training:** Treasury Acquisition Institute (see page 28 for class dates)
- **Online Basic COTR Training:** Defense Acquisition University Continuous Learning Center - <http://clc.dau.mill>. The following 3 online courses meet the 24-hour requirement:

| Course No. | Name                     | Hours |
|------------|--------------------------|-------|
| CLC 106    | COR with a Mission Focus | 8     |
| CLM 024    | Contracting Overview     | 8     |
| CLM 016    | Cost Estimating          | 8     |

Instructions for Registering & Accessing DAU-CLC courses and maintenance training recommendations are located on the TAI COTR Web Page: <http://awss.procurement.irs.gov/tai/cotrs.htm>

**Note:** These courses may also be used to fulfill the 8-hour maintenance training requirement. If you are completing the online courses to meet the Treasury basic training requirement, all 3 courses must be successfully completed in order to fulfill the 24-hour requirement. Upon successful completion, you must print & maintain all 3 Certificates of Completion as evidence of meeting the Treasury training requirement.

### **Additional Resources**

#### **Department of the Treasury COTR Policy (Revised - April 28, 2004)**

- Acquisition Circular (AC) No. 02-01, April 28, 2004 Department of Treasury Acquisition Regulation (DTAR) 1001.670 – Training, Nomination, Appointment, and Termination of Appointment of Contracting Officer's Technical Representatives (COTRs)  
<http://www.treas.gov/offices/management/dco/procurement/policy/ac0201.pdf>
- DTAR 1052.201-70 - Contracting Officer's Technical Representative (COTR) Appointment and Authority  
[http://awss.procurement.irs.gov/tai/docs\\_forms/dtar\\_1052.201-70.doc](http://awss.procurement.irs.gov/tai/docs_forms/dtar_1052.201-70.doc)

## SECTION 4: FY 2007 SUBJECT LISTING OF COURSE OFFERINGS

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### **Mandatory Contracting Courses for 1102 Series Treasury Procurement Personnel**

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| CON 210: Government Contract Law .....                         | 15 |
| CON 353: Advanced Business Solutions for Mission Support ..... | 16 |

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### **Specialized Contracting Courses for Treasury Procurement Personnel**

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| Strategic Business Advisor .....                     | 24 |
| Task Order Contracting.....                          | 24 |
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### **Strategic Sourcing Courses for Treasury Procurement Personnel**

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### **Contracting Officer's Technical Representative (COTR)**

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## **Information Technology Project Management Courses for Treasury Procurement Personnel**

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## **Project Management Courses for Treasury Procurement Personnel**

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## **Business Analysis Courses for Treasury Procurement Personnel**

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## **Personal Development Courses for Treasury Procurement Personnel**

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## Mandatory Contracting Courses for 1102 Series Treasury Procurement Personnel

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### CON 100: Shaping Smart Business Arrangements

#### **Learn How To:**

- Function as a business manager
- Work with the customer and the financial and commercial communities to fashion smart business arrangements
- Perform market research
- Take advantage of e-business technologies and systems in the contracting world
- Select training and development opportunities for career progression
- Apply current federal acquisition initiatives and new policies

#### **Course Description:**

Those new to contracting will gain a broad, comprehensive understanding of the environment in which they serve. You will develop professional skills for making business decisions and advising other acquisition team members toward success in meeting customers' needs. Before delving into technical knowledge and contracting procedures, you will first learn about different mission areas along with the types of business alternatives that may be selected for each area. Knowledge management and information systems, as well as recent acquisition initiatives, will be introduced.

Participation in small group simulation exercises will prepare you to provide contracting support within the overarching business relationships of government and industry and the political roles and relationships required.

**DATE:** January 22 – 26, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

### CON 110: Mission Support Planning

#### **Learn How To:**

- Find solutions to common problems
- Locate, understand and implement the rules of contracting
- Identify important sources of marketing information
- Understand the FAR system
- Utilize the keys to successful contract administration

#### **Course Description:**

As a contracting professional—either new to procurement or with years of experience—your skills and knowledge directly contribute to the success and growth of your organization and to the development of your career. By attending Federal Contracting Basics you'll receive the proven tools and guidance you need to fulfill your key responsibilities and to contribute to the success of the contracting projects in which you are involved.

This course is an intensive, five day introduction to government contracting, giving you the information you need to understand procurement from start to finish—from contract formation to contract completion. You'll analyze key issues fully and receive a clear understanding of their practical application to your everyday job responsibilities. You'll learn how federal contracting really works, how to find solutions to common problems, how to understand the content of key contract documents and how the Federal Acquisition Regulation (FAR) works. In addition, you'll receive a free copy of the FAR for permanent reference. All of this will be accomplished through dynamic lectures, case studies and interactive exercises.

**DATE:** October 16 – 20, 2006

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

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## Mandatory Contracting Courses for 1102 Series Treasury Procurement Personnel

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### CON 111: Mission Strategy Execution

#### **Learn About:**

- The rules of source selection today
- What those rules really mean
- Key terms, definitions and policies
- How to prepare proposals and develop evaluation criteria and scoring methods
- Procedures for making sound business decisions
- How winners are selected
- Procedures for streamlining the process

#### **Course Description:**

How do you pick the winner? How can you increase the likelihood of being the winner yourself? One of the most critical steps facing agencies and contractors in government contracting is source selection—the process agencies follow to choose among competing proposals. In response to demands for improvements in the quality of supplies and services, federal agencies are increasingly using best-value criteria to award contracts. While the process gives agencies great latitude, the procedures are demanding of agency personnel and competing offerors. In addition, the rules give you little guidance on how best to select evaluation factors and evaluate proposals.

Through lectures and comprehensive case studies, this hands-on course will provide you with a number of major benefits, including a solid understanding of what the rules mean and skill training on the principles and processes of sound business decision analysis and decision making. In addition to being of enormous value to government personnel, this course offers industry professionals a wealth of insights into the source selection process and the tools to use those insights to develop effective, winning proposals.

**DATE:** February 12 – 16, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** CON 110

### CON 112: Mission Performance Assessment

#### **Learn How To:**

- Effectively conduct contract administration and manage change
- Interpret contracts and recognize terms and conditions that protect or threaten you
- Keep contracts and subcontracts on track every step of the way
- Modify, terminate and closeout contracts
- Apply hands-on systems for performance monitoring and swiftly spot and correct problems
- Document a contract administration plan

#### **Course Description:**

Just as a chain is only as strong as its weakest link, a contract can be only as strong and as successful as its administration. In this highly practical course, you'll address all aspects of effective contract administration—from initial award to final closeout. Special emphasis will be given to successful administration of contracts: problem avoidance, day-to-day operating practices, and performance monitoring systems, early detection and correction of nonperformance, payment, contract modifications and working relationships.

You'll learn proven practices for getting contracts off to a solid start, keeping them on track and handling every problem that arises. To obtain maximum benefit from the course, you should have a basic knowledge of the procurement process. This course builds on the foundation established in CON 110 and CON 111 and provides students with the knowledge necessary to identify and utilize appropriate performance metrics when evaluating contractor performance.

**DATE:** May 7 – 11, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITES:** CON 110 and CON 111

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## Mandatory Contracting Courses for 1102 Series Treasury Procurement Personnel

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### CON 120: Mission Focused Contracting

#### **Learn How To:**

- Provide contracting advice based on market research
- Prepare a solicitation package
- Prepare, award and debrief a contract requirement
- Evaluate price reasonableness and conduct price negotiations
- Plan and conduct a post-award conference
- Modify a contract, exercise a contract option and complete the contract closeout process

#### **Course Description:**

CON 120 is a capstone federal contract applications course, built upon a hypothetical federal procurement that is applicable to both government and industry purchasing. This highly interactive course uses an integrated case study approach to engage participants in the entire acquisition process, from meeting with the customer to completing the contract closeout process, and closes with a detailed case study for placement of orders against Federal Supply Schedule IDIQ contracts.

You will learn and apply leadership, problem solving and negotiation skills, applying the knowledge and skills gained from your experience and prior classes. A complex series of coordinated exercises guides you through every phase of the acquisition process, giving you the opportunity to discuss and decide how to resolve issues relating to everything from market research/product description to source selection and award and on through contract administration and closeout.

**DATE:** January 22, 2007 – February 2, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITES:** All other CON 100 level courses (CON 100-112)

### CON 202: Intermediate Contracting

#### **CON 202**

#### **Course Description:**

Contracting personnel will gain the skills to perform critical duties required to plan for complex acquisitions, and evaluate, award, and administer complex contracts. After successful completion of this course, the student will be able to: determine the government's need; solicit, evaluate offers, and award contracts; develop a contract administration plan; monitor performance of contractors; modify contracts; process payments; and terminate and closeout contracts.

#### **Major topics include:**

- Determining the Government's Need
- Plan for Source Selection
- Source Selection Strategy
- Soliciting the Marketplace
- Evaluation
- Competitive Range and Discussions
- Subcontracting
- Source Selection and Award
- Placing Orders Against Task and Delivery Order Contracts
- Initiation of Contract Administration
- Quality Assurance and Performance Delays
- Modifications and Un-priced Actions
- Contract Payment, Financing and Funding
- Property
- Terminations and Closeout

**DATES:** February 5 – 16, 2007  
April 9 – 20, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, practical exercises, independent readings

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITES:** All CON 100 level courses



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## Mandatory Contracting Courses for 1102 Series Treasury Procurement Personnel

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### CON 204: Intermediate Contract Pricing

#### **Course Description:**

This intermediate level course is designed to build on Price Analysis and Cost Analysis and give contracting personnel and price/cost analysts' greater capability to handle more complex pricing situations. Use of the computer as an aid to analysis is emphasized. After successful completion of this course, the student will be able to use analytical techniques and applicable references and resources to: analyze prices and costs submitted in complex situations to determine if they are fair and reasonable; formulate cost or pricing positions for a pre-negotiation memorandum that support a fair and reasonable price decision for different types of contract modifications; settle a termination; price equitable adjustments pursuant to delays or a stop work order; analyze lease vs. purchase decisions; and analyze progress payment requests.

#### **Major topics include:**

- Statistics and Regression Analysis
- Market Research and Commercial Item Pricing
- Establishing and Monitoring Contract Types
- Reviewing the Contractor's pricing and Accounting Practices
- Evaluating Indirect Costs
- Net Present Value
- Price Index Numbers and Economic Price Adjustments
- Pricing Equitable Adjustments and Settlements
- Analyzing Profit or Fee

**DATES:** March 26 – April 6, 2007  
June 4 – 15, 2007

**LOCATION:** Management Concepts  
Vienna, VA

**COURSE FORMAT:** Lecture, discussion, practical exercises, independent readings

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITES:** All CON 100 level courses and CON 202

### CON 210: Government Contract Law

#### **Course Description:**

This course focuses on the basic legal principles involved in government contracts by focusing on federal contracts. You'll get expert analyses of the fundamental principles of the common law rules, statutes, regulations, and policy pronouncements as interpreted by the Federal court and board of contract appeals decisions that form the foundations of government contract law. These areas changed significantly during the last several years and more changes are on the horizon.

You'll obtain a practical knowledge of the law and an understanding of how it is applied on a daily basis, as well as find out about recent changes, new developments, and anticipated trends. Class discussions of significant government contract cases, a key feature of the course, provide excellent examples of the many rules, statutes, regulations, and court and administrative board decisions that you must consider when preparing government contracts.

You'll also learn how government contracts differ from standard contracts. Not only must government contracts specify the rights and remedies of the parties involved, but they also must consider the implementation of government policy on socioeconomic issues. Plus, government subcontracts must address the commercial nature of those contracts and their normal commercial ramifications, as well as the government's interests.

**DATE:** April 16 – 20, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, practical exercises, independent readings

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITES:** All CON 100 level courses and CON 202 and CON 204



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## Mandatory Contracting Courses for 1102 Series Treasury Procurement Personnel

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### CON 353: Advanced Business Solutions for Mission Support

#### **Course Description:**

Through realistic scenario-based learning, students work in teams to practice developing sound business solutions as a valued strategic and expert business advisor. Student course work is designed to contribute solutions to senior leadership and local supervisors and to provide resources for the Contracting career field via the course community of practice.

This is a 9-1/2 day classroom course with a **mandatory pre-course assignment** that comprises 25% of each student's final grade. Students will not be allowed to attend unless they complete all on-line assignments. The course requires students to use critical thinking skills and problem solving tools to analyze and make recommendations on issues they bring from their office (local challenge) and an assigned senior leadership challenge.

Students who successfully complete this course will be able to:

- effectively team, exercise business leadership, and apply expertise (technical, business, and financial) resulting in business solutions that improve mission support;
- innovate and use best practices in combination with critical thinking, problem solving, and dilemma resolution skills for improved planning, execution, and performance management outcomes;
- develop business solutions that reflect consideration of risk and impacts on performance and synthesize policy as well as interests of functional team members and the marketplace; and
- contribute to the development and implementation of change through an improved understanding of the legislative, regulatory, and policy processes.

**DATES:** June 4 – 15, 2007  
August 6 – 17, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITES:** All CON 100 & 200 level courses

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## Specialized Contracting Courses for Treasury Procurement Personnel

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### Advanced Source Selection

#### Learn How To:

- Apply in-depth, practical knowledge of the best-value source selection process
- Apply your understanding and skills in buying or selling using best-value source selection
- Approach source selection based on "hands-on" experience through use of case studies, exercises and problem solving
- Effectively and appropriately interact with your acquisition colleagues

#### Course Description:

In-depth knowledge is the key to success in the government's best-value source selection process. With in-depth knowledge, the acquisition team can plan and execute streamlined, innovative source selections that result in timely selection of high-quality contractors. With in-depth knowledge, suppliers can design customer-focused, fully compliant proposals that clearly articulate their technical and cost solutions.

This course provides the in-depth knowledge and practical skills needed to develop world-class requests for proposals (RFPs), execute highly efficient source selection evaluations and build winning proposals. Students already familiar with the basics of source selection will progress to a deeper level of understanding and skills mastery.

The course is built around an integrated set of practical exercises, relevant GAO case studies, agency best practices and the latest in government source selection directions and trends. Participants will gain an increased understanding of and experience with the critical challenges, common pitfalls and numerous opportunities for innovation that are now available in the government's best value process.

**DATE:** March 5 – 8, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

### Contract Closeout

#### Learn About:

- Key regulatory requirements that influence the federal contract closeout process
- How to save the government money by mastering techniques and practices to complete the closeout process timely and effectively
- How to coordinate the roles of multiple players involved in closing contracts
- How the closeout process could be improved from the perspectives of today's federal rule makers and procurement professionals
- How to overcome obstacles and close contracts in a timely manner

#### Course Description:

Contract closeout is the most unheralded phase of the procurement process, yet, when performed efficiently and effectively, it can protect the government's interests and free up significant dollars for current-year program priorities. This practical, two-day course strikes an optimal balance between theory and practice by presenting the regulatory basis for the contract closeout process and then taking participants beyond theory to a real-life perspective on the challenges of actually doing closeout.

Interjected liberally throughout the course are valuable, proven tricks of the trade to help participants overcome the many pitfalls and delays inherent in the closeout of complex contracts. Participants learn by doing through a variety of case studies and exercises that bring the real world of contract closeout to the classroom.

You'll leave this course armed with a thorough, up-to-date knowledge of current rules and practices of contract closeout and a newfound confidence in your ability to apply this knowledge when you return to the office.

**DATE:** February 21 – 22, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE** Treasury Procurement Personnel

**PREREQUISITES:** None

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## Specialized Contracting Courses for Treasury Procurement Personnel

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### Contract Disputes and Terminations

#### Learn How To:

- Determine when and how a contract may be terminated for convenience
- Calculate the amount due under a termination settlement proposal
- Apply the rules applicable to terminations for default and identify contractor defenses to default
- Determine the rights and liabilities of the parties after a termination for default
- Prepare a claim, issue and respond to a contracting officer's final decision and comply with the applicable statutes of limitations
- Identify opportunities for Alternative Dispute Resolution (ADR)

#### Course Description:

Contract disputes and terminations are the most problematic aspects of contract administration for both the government and the contractor. This two-day course prepares government and contractor personnel to deal effectively with the complex issues that arise when a contract is terminated or a claim is submitted. In addition to addressing the many procedural rules that could mean the difference between success and failure, this course merges the discussion of terminations and contract disputes so you can gain a better appreciation of the many ways in which these two processes are interrelated.

You will get a step-by-step analysis of terminations for convenience, terminations for default and the disputes process, including Alternative Dispute Resolution. Because failure to follow the procedural rules in any of these areas could cause you to lose valuable contractual rights, this course tells you what you need to know to ensure success. You will also receive information about the latest regulatory changes and case law developments in these areas so you will be fully prepared if you are suddenly faced with a termination or claim.

**DATES:** March 27 – 28, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

### Contract Management Principles and Practices

#### Learn How To:

- Identify contract components and understand the process from start to finish
- Select the right contract type for your project
- Decipher contract legalese
- Choose the offer that will result in the best value for the buyer
- Agree on objectives, requirements, plans and specifications
- Negotiate favorable terms and make revisions to the contract
- Apply the "10 rules of contract interpretation" in project disputes
- Administer contracts appropriately, and know when and how to terminate before or upon completion

#### Course Description:

Project Managers, contract managers and other professionals involved in the world of contracts must be able to work effectively together and with customers, contractors and subcontractors to accomplish key organizational objectives. Because contracts are developed in an increasingly complex environment, including the rising use of contracted supplies and services throughout government and industry, a solid understanding of the contracting process is critical and can give you an advantage whether you are on the buyer's or seller's side. Get an overview of all phases of contracting, from requirements development to closeout.

This course explores these vital issues from the manager's perspective, highlighting key roles and responsibilities to give you greater influence over how work is performed. You'll also discuss actions that can be taken to help ensure that contractors or subcontractors perform as required under the contract. Effective contract negotiation and administration can ensure project success, speed performance, and reduce risks and costs along the way.

**DATES:** TBD

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

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## Specialized Contracting Courses for Treasury Procurement Personnel

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### Earned Value Management Fundamentals

#### **Learn How To:**

- Use a practical process to manage project cost, schedule and performance
- Identify the program management data elements and processes associated with PMB development
- Understand how the ANSI EVM Industry Standard is used to certify EVM-integrated management systems
- Explain the IBR process and purpose, as well as compute and comprehend the meaning of selected EVM metrics and estimates at completion
- Describe, in plain language, the acronyms and meaning of EVM-associated vocabulary
- Identify acquisition organizations, stakeholders and formal agreements associated with EVM

#### **Course Description:**

This course will introduce you to the fundamental concepts of earned value management (EVM). A solid understanding of EVM concepts is critical and can give you an advantage, whether you are a contracting officer, contract administrator, COTR, program manager or project manager.

You'll get a hands-on overview of the process of EVM, from project development to execution. You will learn the language associated with EVM as it applies to federal acquisition management and dealing with OMB in the budget process. The course emphasizes the processes related to the Performance Management Baseline (PMB), the Integrated Baseline Review (IBR), and the American National Standards Institute (ANSI) for EVM systems. You'll also learn about evaluating and computing basic EVM metrics and EVM metrics-based Estimates at Completion (EAC). You'll end the course with an understanding of project surveillance and program/ project execution.

**DATES:** April 30 – May 4, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Acquisition Personnel

**PREREQUISITE:** None

### Federal Appropriations Law

#### **Learn How To:**

Learn precisely how the Federal government's budget and spending system works—and how to avoid impasses at each phase in the process, from initial planning through ultimate disbursement.

- Initial planning phase
- Budgeting
- Congressional role
- Limitations on spending
- Anti-deficiency questions
- Contract funding
- Personal liability
- Statutory compliance

#### **Course Description:**

Under the current administration and Congress, financial pressures are mounting—and will continue to do so in the future. For those who handle Federal funds, finding ways to do more with less is essential.

The subtle rules on the availability of appropriations can block an otherwise well reasoned management plan. These rules are difficult to understand and not well known or publicized. Fortunately there are clear precedents that you can follow to avoid reaching an impasse - and to avoid incurring personal financial liability for failure to comply.

This course takes you through every facet of the budgeting and spending processes. You will get a thorough analysis of all funding activities, as seen through the eyes of the contracting, certifying, and disbursing officers. And you will participate in sessions that explore controlling decisions by the General Accounting Office (GAO).

**DATE:** March 12 – 15, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

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## Specialized Contracting Courses for Treasury Procurement Personnel

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### GWACs, IDIQ, Contracts & Schedules

#### **Learn About:**

- GSA and DoD's "Get It Right" campaign and you
- How agencies can use products, services and contract prices created by other agencies to save time, manpower and procurement costs
- The unique contract administration issues you must consider
- The key aspects of contract pricing under GWACs, IDIQ contracts and schedules
- FASA and Clinger-Cohen Act requirements for GWACs and IDIQ contracts

#### **Course Description:**

Today, federal agencies can choose from a wide range of established contracts when purchasing commercial items, including both supplies and services. Among the most popular yet controversial innovations to date are the multi-agency IDIQ contracts known as government-wide agency contracts (GWACs).

GWACs are IDIQ contracts for products and services entered into by one federal agency but available for use by any other federal agencies and some federal contractors. Rapidly proliferating for the procurement of information technology, there are at least 30 GWAC programs now in place. About fourteen of these account for purchases estimated at between \$100 million and \$8 billion annually.

In this course, you will analyze the ways GWACs are awarded and used and discuss issues such as source selection, ordering procedures, pricing, franchise funds and contract administration. The course also provides a summary of the rules applicable to MAS contracts and the new simplified acquisition rules for open-market purchases up to \$5 million.

**DATES:** December 5 – 6, 2006  
February 27 – 28, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

### Incentive Contracts

#### **Learn About:**

- The different types of incentive contracts
- How to structure and apply the Range of Incentive Effectiveness
- How to properly write contracts with multiple incentives
- How to administer and comply with incentive contracts

#### **Course Description:**

Incentive contracts can be used to motivate the government contractor to control costs and strive for outstanding technical and/or schedule performance. At their best, incentive contracts provide the foundation on which to build win-win outcomes for buyer and seller. Proper selection of contract vehicle and structuring of related incentives minimizes common problems such as: cost overruns, schedule delays and failure to achieve expected results. At their worst, incentive contracts can spell disaster for both buyer and seller when selected inappropriately, structured poorly or administered ineffectively.

The focus of this course is to provide a comprehensive understanding of the decisions to be made when using incentive contracts and the likely consequences associated with those decisions. It also shows how best to optimize performance, minimize costs and motivate delivery.

Take advantage of this opportunity to get a firm grasp of the key issues critical to selecting, structuring and administering incentive contracts.

**DATE:** December 12 – 13, 2006

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None



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## Specialized Contracting Courses for Treasury Procurement Personnel

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### Managing Cost-Reimbursement Contracts

#### Learn How To:

- Use the best type of cost-reimbursement contract for your circumstances
- Create justifiable cost analysis procedures for proposals Improve contract administration skills
- Establish and negotiate performance-based incentives and award fees
- Cost-reimbursement contracts' unique cost allow ability and allocability requirements

#### Course Description:

On the surface, cost-reimbursement contracting offers the government and contractors a direct route to success. Most often used when the cost of a particular procurement is too uncertain for a fixed-price contract, the process seems simple enough: contractors are reimbursed for allowable and properly allocated costs; the government is limited in its obligation to reimburse costs over a certain limit; and, both sides follow specific procedures at every stage.

Beneath the surface, however, are uncertainties and the potential for significant problems, particularly in contract formation and administration. How, for instance, do government representatives show that a cost-reimbursement contract is indeed the most advantageous, lowest-cost route to take for a particular project? What type of cost-reimbursement contract is best for the circumstances? How will proposal evaluation and source selection occur if costs are uncertain? What monitoring is necessary to ensure that costs are reasonable controlled and based on efficient practices? This course answers these questions, and more.

This course is a complete cost-reimbursement contracting guide. It provides government and industry personnel with the practical guidance needed to understand and then efficiently manage cost-reimbursement contracts.

**DATES:** January 16 – 19, 2007  
May 21 – 24, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

### Managing Outsourcing Contracts

#### Learn How To:

- Increase your effectiveness in managing the outsourced service environment
- Initiate and define services with an outsourcer and manage your business' expectations
- Establish and manage effective service- level agreements
- Design proactive contract and services oversight in an outsourced environment
- Manage service deficiencies and apply strategies to reduce "service issues"
- Manage business and outsourcing contract changes to ensure effective service delivery

#### Course Description:

Outsourcing contract managers face a number of significant challenges, including understanding and managing a changing business, ensuring appropriate alignment between business processes and the outsourcing contract, and handling widely varying expectations from the client and outsourcer's organizations. As such, the outsourcing contract manager requires a refined set of business, service-level management and contract governance skills in order to effectively support the organization's needs.

In this course, you will learn how to succeed in an environment where critical processes have been outsourced. Numerous examples, tools and analyses provide valuable information on what makes outsourcing contracts successful and help ensure the appropriate alignment between these complicated contracts and client business needs.

This course provides a set of practical tools and techniques designed to get you up to speed quickly on outsourcing contract issues. This is "real-life" information, directly from the trenches and facilitated by instructors who have successfully managed long-term, multi-million- dollar outsourcing contracts.

**DATE:** February 6 – 8, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

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## Specialized Contracting Courses for Treasury Procurement Personnel

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### Overview of Government Contracting

#### **Learn How To:**

- Identify all of the key phases of the acquisition process
- Understand the limitations applicable to the use of appropriated funds
- Correctly plan an acquisition and select the most appropriate contract type
- Identify typical contractual issues and explain how to manage them
- Better manage and administer contracts after award

#### **Course Description:**

This concentrated two-day course covers all of the most critical aspects of the federal contracting process. The course is intended for those who are new to federal contracting and want to gain an understanding of the basic concepts. It is also intended for non-contracting personnel who are indirectly or occasionally involved in contracting and want to better understand this complex subject, including senior agency personnel, financial managers, technical and quality assurance personnel, evaluators, attorneys, logisticians and private sector personnel seeking to do business with the federal government.

The course effectively combines informative lectures with numerous practical examples and exercises to reinforce the most important aspects of the material. In addition to the course manual, students will receive the most recent edition of the Federal Acquisition Regulation (FAR), which will be used throughout the course to familiarize students with this critically important reference.

**DATES:** January 17 – 18, 2007  
June 12 – 13, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Acquisition Personnel

**PREREQUISITE:** None

### Seven Steps to Performance-Based Acquisition

#### **Course Description:**

Seven Steps to Performance-Based Acquisition is a three-day course that gives acquisition professionals the knowledge and tools needed to plan and award contracts using the Statement of Objectives approach.

This course teaches a seven step process to develop a performance-based acquisition structured around the desired outcome. By working through the seven steps, students develop performance-based competencies that can be immediately applied to acquisition requirements.

**DATES:** January 29 – 31, 2007  
March 19 – 21, 2007  
May 21 – 23, 2007  
August 6 – 8, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Acquisition Personnel

**PREREQUISITE:** None

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## Specialized Contracting Courses for Treasury Procurement Personnel

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### Simplified Acquisition

#### **Learn About:**

- The impacts of recent acquisition reform legislation
- Limitations on simplified acquisitions
- Which socioeconomic factors to consider
- What to do to ensure sufficient competition and price reasonableness
- How to prepare purchase orders
- When blank purchase agreements can be used
- Innovations in small purchasing

#### **Course Description:**

The Federal Acquisition Streamlining Act of 1994 (FASA) made key changes in the way Federal agencies conduct their simplified acquisitions (previously called "small purchases"). The act underscored the government's long-standing policy of filling requirements through the use of simplified procedures designed to reduce administrative costs and widen opportunities for small and small disadvantaged businesses to obtain a fair proportion of government contracts. Among other changes, the law introduced a \$100,000 threshold, revised the policies governing set-aside and preference programs, and provided super-streamlined procedures for "micro-purchases" and identified laws and requirements that are inapplicable to simplified acquisitions.

This course provides in-depth, up-to-the-minute coverage on the full range of small purchase policies and procedures, including the revised Federal Acquisition Regulation (FAR) language. In addition to explaining the many changes that have occurred in the simplified acquisition area, the course also emphasizes the well-established rules that have not changed with FASA, such as compliance with FAR Part 8, required source of supply, the regulatory prohibition against splitting orders, and contract reporting.

**DATE:** April 10 – 12, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

### Six Disciplines of Performance-Based Management

#### **Course Description:**

At the heart of performance-based contracting is managing for results. Contract award is only the beginning of the process. Results are achieved through contract performance.

This course focuses on the seventh step, Deliver Results through Partnership, of the Seven Steps to Performance-Based Acquisition course. Participants will learn how to manage performance while staying focused on outcomes. This course carries acquisition teaming into the 6 key disciplines of the post-award phase.

**DATES:** February 1 – 2, 2007  
March 22 – 23, 2007  
May 24 – 25, 2007  
August 9 – 10, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Acquisition Personnel

**PREREQUISITE:** None



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## Specialized Contracting Courses for Treasury Procurement Personnel

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### Strategic Business Advisor

#### **Course Description:**

The Strategic Business Advisor course transforms the acquisition professional from a technical expert into a strategic member of the acquisition team. This course focuses on the skills needed to achieve outcome-based results. Students who complete the course are empowered to contribute far more effectively to achieving agency acquisition needs.

The role of the acquisition professional is shifting from that of the conventional process, risk adverse contracting officer to results-oriented business advisor. The traditional contracting officer may have fulfilled the organizational function of negotiating acquisition prices, reacting to the market's supply, and managing the supplier base, but the business advisor is moving beyond that role.

In today's complex business environment, all acquisition professionals must be well versed in the tools, techniques, and processes of acquisition. This course is designed to bridge the gap between the technical specialist and a strategic business advisor and focuses on leveraging technical and market knowledge and skills to solve acquisition challenges that deliver exceptional results.

**DATES:** December 5 – 7, 2006  
February 20 – 22, 2007  
April 23 – 25, 2007  
June 5 – 7, 2007  
July 24 – 26, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

### Task Order Contracting

#### **Learn About:**

- Key features of task order contracts
- How to write an effective statement of work for a task order contract
- The best pricing structures for task order contracts
- How to conduct source selections effectively when using task order contracts
- Competition requirements

#### **Course Description:**

Even though task order arrangements have been used by government agencies for many years, their use became more widespread during the mid-1990s. These contracts have grown in popularity despite the controversies surrounding them.

Task order contracts provide government agencies with flexible arrangements for acquiring a wide variety of services from commercial organizations. They take many forms, including fixed-price-indefinite-delivery, cost-reimbursement, time-and-materials, labor-hour, or some combination of these. They may require the completion of a clearly defined task, delivery of a level of effort, or both.

This two-day course focuses on the key issues in the formation and administration of task order contracts. It also addresses central controversies, such as competitive practices and pricing and accounting for uncompensated overtime by professional employees. This course will help you understand these flexible arrangements and avoid problems that can arise when they are used.

**DATE:** January 17 -18, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

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## Specialized Contracting Courses for Treasury Procurement Personnel

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### Vendor Selection: A Collaborative Approach

#### **Learn How To:**

- Identify and quantify the factors that help define the most appropriate vendor relationship
- Conduct a make-buy analysis
- Perform market research to identify an appropriate vendor
- Determine the appropriate contract type to facilitate success
- Determine when and how to establish collaborative relationships for win-win results
- Monitor and control vendor performance to achieve project objectives

#### **Course Description:**

Determining when to use a vendor and how to select and manage a vendor effectively can make or break even the most carefully planned project. Understanding the factors that determine the most appropriate vendor relationship is crucial to your success. Proactive involvement in establishing the vendor relationship, from selecting the vendor, determining the appropriate type of contract, to establishing the contract terms is essential to effective vendor management and to the success of your project.

In this course, you'll be introduced to a unique model to help determine the most appropriate vendor relationship to address your various project needs. The course covers what you need to know to influence the contracting process in order to establish more effective, long-term, win-win relationships with capable, compatible "partners."

The course will examine the pros and cons of three alternative contractual relationships: arm's-length, collaborative and alliance. Emphasis is placed upon structuring and managing effective collaborative relationships.

**DATE:** January 9 – 11, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

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## Strategic Sourcing Courses for Treasury Procurement Personnel

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### Commodity Strategy Development

- Provides participants an understanding of a comprehensive commodity strategy and the steps required to develop one
- Provides examples of commodity strategies that have implemented successfully
- Enables participants to obtain hands-on experience in a structured, classroom setting

#### **Course Description:**

Strategic sourcing is not just about leveraging spend and negotiating with suppliers. It's about determining the "levers" that can lead to most benefit and reduction in Total costs (not just price). These levers can either be related to demand (e.g. specifications, policies, substitutes) process, or supply. A commodity strategy takes into account all the sourcing levers available for a specific commodity and developing a comprehensive strategy that allows overall objectives to be met.

*Commodity Strategy Development*, one of the first three courses in the Strategic Sourcing curriculum, is designed to provide participants the ability to develop comprehensive commodity strategies that go beyond just acquisition strategies. Commodity strategies address business objectives for a commodity, opportunities and options for managing demand and securing supply, cost/benefits (business case) of using different options, and a comprehensive strategy (including acquisition strategy) that provides a "To Be" model for meeting the identified business objectives. The first two steps of the strategic sourcing process, Commodity Profiling and Market/Industry Analysis, serve as key inputs that drive commodity strategies.

**DATES:** October 4, 2006  
April 25, 2007  
June 28, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

### Strategic Sourcing Overview

- Provides participants a broad understanding of the entire strategic sourcing program
- Provides examples of successful strategic sourcing programs in the government
- Enables participants to obtain hands-on experience in a structured, classroom setting

#### **Course Description:**

With the recent OMB mandate for agencies to implement strategic sourcing programs, the government acquisition community is expected to undergo a transformational change that will shift its focus from tactical purchasing practices towards a more strategic process. Strategic Sourcing, defined as "the collaborative and structured process of critically analyzing spending and using this information to make business decisions efficiently," is expected to save agencies millions of taxpayer dollars while allowing them to still meet critical mission requirements.

*Strategic Sourcing Overview* provides a comprehensive review of Strategic Sourcing, from beginning to end. This course provides an overview of the entire strategic sourcing process, with an in depth look at each of the steps in strategic sourcing, from Spend and Industry Analysis to Commodity strategy development. The course will consist of lecture, case study and hands-on experience collecting and analyzing data.

**DATES:** April 23, 2007  
June 26, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

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## Strategic Sourcing Courses for Treasury Procurement Personnel

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### Supply/Market/Industry Analysis

- Provides participants the skills necessary to begin conducting market/industry analyses
- Enables participants to obtain hands-on experience in a structured, classroom setting
- Provides an experience that will enable participants to return to their organizations and conduct market analysis

#### **Course Description:**

With increased competition and globalization, industries are constantly changing. Keeping up with these changes is critical to understand implications on acquisition. An integral part of the strategic sourcing process, a market/industry analysis is aimed at developing deep knowledge of a market and using this information to drive sourcing decisions.

*Supply/Market/Industry Analysis*, part of the Strategic Sourcing curriculum, is designed to provide participants a deep dive into the process and tools required to conduct a thorough market analysis. The course provides a step-by-step guide for conducting research, understanding basic facts of a market including cost structure and competitive dynamics, and developing a deeper understanding of supplier capabilities. The course will consist of lecture, case study and hands-on experience collecting and analyzing data.

**DATES:** October 3, 2006  
April 24, 2007  
June 27, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

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## Contracting Officer's Technical Representative (COTR)

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### Treasury Contracting Officer's Representative (COTR) Training

#### **Course Description:**

The complexity of Federal contracting continues to increase every year. Contracting Officer's Technical Representatives (COTRs) are technical employees who perform contract-related duties and play a vital role in acquiring goods and services for the Government. In addition, COTRs play a critical role in ensuring that contracting is conducted in an effective and efficient manner that meets the public's interest. COTRs have many responsibilities including, but not limited to, participating in acquisition planning and market research; developing specifications and work statements; evaluating offers and assisting in source selection; and monitoring and evaluating contractor performance.

This course covers all material current with the most recent regulation and policy changes as it relates to COTRs including, but not limited to:

- Roles, responsibilities and authority in the federal acquisition process
- Policies, regulations and laws related to federal acquisitions
- Acquisition planning, contract formation, contract management and contract administration processes including contract closeout
- Market Research
- Writing contract specifications and work statements
- Evaluation planning, source selection and review of bids/proposals
- Monitoring contract/contractor performance
- Procurement ethics
- Performance Based Contracting
- Competitive Sourcing
- Treasury and IRS Contractor Background Investigation requirements

|               |                               |                         |
|---------------|-------------------------------|-------------------------|
| <b>DATES:</b> | October 16 – 20, 2006         | May 7 – 11, 2007        |
|               | October 30 – November 3, 2006 | May 21 – 25, 2007       |
|               | November 13 – 17, 2006        | June 4 – 8, 2007        |
|               | December 4 – 8, 2006          | June 25 – 29, 2007      |
|               | January 8 – 12, 2007          | July 9 – 13, 2007       |
|               | February 5 – 9, 2007          | August 13 – 17, 2007    |
|               | March 5 – 9, 2007             | August 20 – 24, 2007    |
|               | April 2 – 6, 2007             | September 10 – 14, 2007 |
|               | April 30 – May 4, 2007        |                         |

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Acquisition Personnel

**PREREQUISITE:** None

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## Contracting Officer's Technical Representative (COTR)

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### COTR Management of IT Service Contracts

#### **Learn About:**

- The COTR's essential role in identifying, analyzing and controlling IT risk throughout the contract management life cycle
- The benefits of continuous IT market research and the COTR's leadership of the process
- Applying performance-based acquisition techniques to IT contracts
- The key role of the COTR in planning, buying and measuring "results" in IT acquisitions
- The process model for building effective service level agreements (SLAs) for IT contracts
- The COTR's responsibilities in establishing IT-related terms and conditions on the contract
- Essential skills in COTR management of the post-award IT contract

#### **Course Description:**

The Contracting Officer's Technical Representative (COTR) plays an essential role in the planning, awarding and management of the information technology (IT) contract. Their technical expertise and project management skills are critical in designing performance-based acquisitions that respond to risk, motivate excellent contractor performance and ensure organizational goals and objectives are being met.

In this course, you'll learn the essential techniques for being an effective COTR on IT contracts. The course addresses the COTR's role throughout the IT contract life cycle—from defining initial requirements to effective post-award performance management. It will help you understand the importance of early IT risk assessment and how risk mitigation and control influences the entire IT contracting process. Through classroom exercises and case study analysis, you will receive an assortment of practical IT COTR management tools and techniques that can be immediately applied back on the job.

**DATE:** March 13 – 15, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Acquisition Personnel

**PREREQUISITE:** None

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## Information Technology Project Management Courses for Treasury Procurement Personnel

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### Information Technology Risk Management

#### Learn How To:

- Use a practical, eight-step process to manage IT project risk
- Identify threats and opportunities and weigh their relative value in your project
- Develop practical response strategies for common IT project risks
- Overcome stakeholder and team member roadblocks to risk strategy implementation
- Make risk and opportunity integral components of your next IT project plan

#### Course Description:

The unique challenges of IT projects make it mandatory that a successful IT project manager be a skilled risk manager. Risk will always exist in IT projects given the need to deal with challenging requirements and expectations, complex and ever-changing technologies and business needs, and aggressive schedules and budgets to support business success. However, it is not inevitable that risk management will be an impossible task that will result in your being viewed as reactive, or worse, unresponsive.

In this course, you'll learn to look at risk management as a way to seize opportunities, minimize threats and achieve optimum results. You'll work through the proactive approach to threat and opportunity—based on a clear understanding of the powerful nature of both qualitative and quantitative approaches to risk management. You'll leave this course prepared to face the challenges and opportunities of risk management with new practices to apply in your environment and new insights on the implications and advantages of applying risk management well.

**DATE:** February 20 – 22, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

### Managing Information Technology Projects

#### Learn How To:

- Define the role of the IT project manager
- Develop a results-driven project management team
- Identify, interpret, and manage the real project requirements
- Develop a focused project plan to manage IT projects
- Estimate IT project costs and schedules using proven techniques
- Find solutions to problems specifically related to IT projects

#### Course Description:

Today's IT projects present unique challenges to the project manager requiring coordination with many stakeholders and integration of various technological capabilities. In Managing IT Projects, you'll discover critical success factors and hidden risks inherent in IT projects—and you'll leave with an understanding of strategies and techniques developed in the field by experienced IT project managers for successfully managing IT projects.

"IT" means different things to different people. This course addresses all areas of IT project management: hardware, software, systems integration, communications, and human resources. It addresses the role of the project manager and the project team at each phase of the project life cycle, helping you gain the foundation, basic experience, techniques and tools to manage each stage of your project. You'll learn techniques to determine customer requirements, set goals tied directly to stakeholder needs, get the most from your project management team, and utilize project management tools to get work done on time and within budget.

**DATE:** January 9 – 11, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None



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## Information Technology Project Management Courses for Treasury Procurement Personnel

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### Network & Telecom Principles for Project Managers

#### Learn How To:

- Identify the project management considerations inherent in network and telecommunications projects
- Understand the basics of the technology available for LAN and WAN data communication projects
- Communicate effectively with data communications managers, customers and users
- Match network design to organizational needs
- Understand fundamental principles of network security
- Assess and mitigate risks inherent to network and telecommunications projects

#### Course Description:

The proliferation of networking systems is forcing IT project managers to learn about voice and data networks on the fly. A growing global economy is making unprecedented demands of organizations' data communications capabilities. Project managers must understand and converse intelligently with project team members, vendors, and customers to understand and meet requirements.

In this course, you'll learn the fundamental principles in data networks with an emphasis on incorporating communication capabilities in information systems design. Learn how network and telecommunications technologies are evolving and how communications systems function and integrate with existing architectures. Explore how standards apply to networks and which constraints influence the design and implementation of network and telecommunications projects. In this course, you will get the background you need to identify and handle the risks, constraints, re-sourcing, and scheduling aspects of network and telecommunications projects.

**DATE:** April 23 – 25, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

### Systems Integration Project Management

#### Learn How To:

- Plan, estimate, and organize system integration efforts
- Apply the decomposition-integration paradigm to manage complexity
- Manage the implementation of complex system interfaces
- Assess and respond to the risks inherent in integration projects
- Apply the decomposition-integration paradigm to manage complexity
- Focus on the business emphasis of systems integration

#### Course Description:

Today's information technology project manager faces projects of increasing size, complexity and risk. Your job as project manager is to make sure that all of the components come together and to see that the project is completed on time and within budget. Yet the definition of "all the components" keeps getting broader and more complex. More and more IT projects depend on critical systems integration (SI) issues, including client/server development, open systems design, enterprise solution implementation, legacy systems maintenance and multi-site deployment.

Now you can identify and explore the complex technical and business issues involved in integrating custom software, hardware solutions, telecommunications networks, commercial off-the-shelf software (COTS), business procedures and services, and support facilities. Through case studies and classroom discussions, you'll experience what it takes to be the project manager on a typical SI project. You'll develop an understanding and appreciation of the problems that can occur and explore ways to solve them. And you'll gain an understanding of the critical need for a systems integration project manager on large IT projects in the real world.

**DATE:** March 20 – 22, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None



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## Project Management Courses for Treasury Procurement Personnel

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### Financial Mgmt for Project and Contract Managers

#### **Learn How To:**

- Communicate more effectively with accounting and financial personnel
- Read, understand and analyze accounting and financial data
- Expand your work in project scheduling and cost control to encompass additional financial metrics and tools
- Minimize project financial risk
- Develop and apply tools for comparing project financial returns

#### **Course Description:**

In today's world of increasing competition and focus on corporate earnings, project and contract managers are held accountable not just for achieving technical and schedule goals, but also for meeting profitability and other financial goals.

This course explores the financial metrics that are commonly used and examines the not-so-obvious financial impact of typical operating decisions and actions. Building on competencies developed in the core management curriculum, you'll examine the inner mechanics of how finance and accounting can impact your project. You'll learn about common financial analysis tools in the project environment that link project management to broader corporate strategic goals.

Case studies and project-related exercises give you the opportunity to apply these proven tools and techniques. You'll see how finance often drives organizational decisions and evaluations of project performance. You'll also learn how operating decisions regarding pricing, terms and conditions, and asset management directly and significantly affect the financial health of your organization.

**DATE:** March 27 – 29, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

### Leading Complex Projects

#### **Learn How To:**

- Apply the concepts of complexity science to project management
- Use the Complex Project Complexity Indicator to assess your project's true complexity level
- Create an innovative framework for managing project complexity using the Complex Project Management Model
- Select specific approaches and leadership techniques to increase your odds of success

#### **Course Description:**

Have you ever taken on a project that appeared just too complex to handle? Just trying to identify the multitude of variables to be managed, let alone to anticipate how they might interact to create unexpected challenges, can be overwhelming. So how do you determine the true complexity, with a clear understanding of the variables involved and move forward to develop a plan that provides the right level of control and flexibility for success?

To manage the complex project requires a new way of thinking—a new approach to applying known project management techniques and tools. Managing Complex Projects provides a systematic approach to assess project complexity and to deploy the best approaches and techniques to achieve success.

The heart of the course is a progressive, integrated case study that gives you hands-on experience in determining the true level of project complexity, governing the use of complexity to assist rather than hinder progress, and to lead the project team from a new perspective.

**DATE:** January 2 – 4, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

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## Project Management Courses for Treasury Procurement Personnel

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### Managing Global Projects

#### **Learn How To:**

- Distinguish the unique characteristics of a borderless or global project effort
- Identify the elements of a global project plan needed to lay the foundation for success in dealing with the challenges inherent in global projects
- Incorporate global project environmental factors into your risk management plan
- Systematically approach and address the unique issues surrounding the management of global projects

#### **Course Description:**

Global trends are reshaping the competitive dimensions in the world and are driving the need for increased use of “borderless,” or global, project management. The management of the global projects cuts across organizational and national borders. Special challenges arise from differences in cultures, mores, tradition, values, philosophies and languages of the project partners. In addition, attitudes of the project team in each of the partner organizations take on added importance. The financial risks and implications of the project can be immense, extending far beyond the financial capabilities of any one partner operating independently. Competition in the global marketplace is becoming dependent on using consistent organizational processes throughout the global community.

In this course you'll develop an understanding of the many unique problems inherent in managing a global project and explore ways to solve them. The case study and exercises provide a clear roadmap for initiating, planning, implementing, controlling and successfully closing out a global project. You will also get numerous tips, templates and tools that you can apply to any of your global efforts.

**DATE:** February 13 – 15, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

### Managing Projects

#### **Learn How To:**

- Master fundamental project management skills, concepts and techniques
- Link project goals and objectives to clear, compelling stakeholder needs
- Develop work breakdown structures
- Set realistic, measurable objectives and ensure positive results
- Estimate project costs and schedules using simple, proven techniques
- Establish a dependable project control and -monitoring system

#### **Course Description:**

Get a solid understanding of project management methods with this comprehensive introductory course. Gain practical experience in proven project management techniques and discover a wealth of valuable, flexible tools that you can use immediately to ensure the success of any project in any type of organization.

This course gives you the foundation, techniques and tools to manage each stage of the project life cycle, work within organizational and cost constraints, set goals tied directly to stakeholder needs, get the most from your project management team, and utilize state-of-the-art project management tools to get the work done on time and within budget.

Covering the entire project life cycle, this course is built around the latest insights from the Project Management Institute's A Guide to the Project Management Body of Knowledge (PMBOK® Guide), which incorporates information critical to project success, are also highlighted. You'll learn project management skills through case studies, hands-on exercises and practical experiences that can immediately be applied to your job.

**DATE:** November 7 – 9, 2006

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

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## Project Management Courses for Treasury Procurement Personnel

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### Negotiation Skills for Project Managers

#### Learn How To:

- Use competitive and collaborative negotiation strategies with success
- Recover a stalled negotiation using breakthrough techniques
- Adjust your negotiating style to match the preferences of the other party
- Deactivate the impact emotions and focus on finding agreement
- Apply negotiation skills for efficient cost and schedule performance
- Plan strategies to effectively develop and manage collaborative relationships critical to your project

#### Course Description:

Negotiation is an invaluable skill for any project manager. Not only do you negotiate agreements with vendors and contractors, but you must effectively negotiate with stakeholders, customers and team members throughout the life of a project.

This three-day highly interactive experience covers the dynamics, processes, techniques of internal and external negotiation situations faced by project managers, and provides participants the opportunity to experience one-on-one negotiations. You will learn how to analyze your own and the other party's negotiation style, diffuse conflict and turn it into an advantage, and negotiate more effectively. You will also learn how to negotiate for efficient cost and schedule performance and achieve successful results on time. Participants will receive coaching and feedback from the instructor and the other participants. By the end of the course, you will have explored the dynamics of both the competitive and collaborative models of negotiation as well as some of the implications of team negotiations. Not only will you gain new skills, but you will gain experience using them in realistic situations.

**DATES:** April 3 – 5, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

### Project Leadership, Management and Communications

#### Learn How To:

- Lead project teams through more effective communication
- Identify motivational value systems to improve productivity and cooperation
- Recognize the role of business and personal ethics in leadership
- Describe predictable change stages and identify appropriate leadership strategies for each stage
- Utilize a powerful four-stage collaborative negotiation process
- Create a Leadership Development Plan to implement when you return to work

#### Course Description:

This course is designed to provide a solid foundation in key leadership competencies and to afford you the opportunity for a truly transformational leadership experience. As a participant, you will complete a self-assessment of your leadership skills, and then master the basics of these leadership competencies: setting direction, aligning people, motivating and inspiring, leading teams, communicating, building relationships, facilitating ethical conduct, negotiating, and leading change.

After assessing your skills, you'll create and refine a personal leadership vision and work on strengthening your leadership competencies as you develop your personal Leadership Development Plan. You'll learn how to empower yourself and other team members through more effective negotiation based on an understanding of the differences between competitive and collaborative negotiation approaches — and you'll gain an appreciation of the importance of a collaborative "win/win" negotiation process. You'll gain a clear understanding of why communication is so important, discover how business and personal ethics can influence your leadership style and personality, and how your individual leadership style and personality can influence the course a project will take.

**DATE:** November 14 – 16, 2006

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

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## Project Management Courses for Treasury Procurement Personnel

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### Quality for Project Managers

#### **Learn How To:**

- Integrate project quality management into the entire project life cycle
- Use five steps to plan effectively for project quality management
- Use five steps to assess and improve your organization's current quality capabilities to ensure that projects will meet specified quality standards
- Ensure customer satisfaction by monitoring results using project quality control tools
- Apply project quality management tools and techniques to "real world" project management situations

#### **Course Description:**

Quality for Project Managers applies quality principles to project management itself, as well as to the products and services resulting from projects. It brings to the forefront the essentials of project quality management and its vital link to business success, with a focus on the tools and essentials of effective quality management that work for your organization, regardless of your industry.

This course prepares the project manager to be a positive force in using project quality management to help ensure project and business success. Businesses today realize that customer satisfaction and thus competitive success hinge on the effective implementation of quality concepts, tools and techniques. You'll learn about the philosophy and principles of quality management and learn how to translate these concepts into specific actions that are key to successful project quality efforts. The course presents a five-step model for successfully planning project quality, a five-step model for effectively assuring project quality and a quality-control toolkit, all of which you can immediately apply to your work environment.

**DATE:** January 30, 2007 – February 1, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

### Requirements Management: A Key to Project Success

#### **Learn How To:**

- Apply a requirements management process to a project life cycle
- Use proper evaluation techniques to verify and gain agreement upon requirements and that meet specific business and technical objectives
- Identify formal and informal techniques to manage stakeholder relationships within the requirements management process
- Implement a change management process to control scope creep

#### **Course Description:**

Requirements are the foundation of any project, yet the number of project failures attributed to inadequate requirements development and management is staggering. As projects progress, "scope creep" often occurs due to the inability to manage constant change. Customers' needs and the project sponsor's needs frequently seem to be at odds. How does the project manager cope with all the turmoil?

This course takes the experienced project manager beyond the basics of all aspects of requirements, from concept through closeout. Participants will learn up-to-date practices for requirements management, including proper selection of tools and techniques for specific types of projects. You'll explore evaluation techniques to verify requirements early in the project life cycle so as to prevent costly rework downstream. Even with a solid process for managing requirements, fallout may still result from the battle between important project stakeholders. Participants will practice methods of effective relationship management and negotiation to ensure agreement on functional requirements.

An action-packed, integrated case study will provide experienced project managers, who already have experience with the basics of requirements management, the opportunity to practice new skills in a supportive learning environment.

**DATE:** May 8 – 10, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

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## Project Management Courses for Treasury Procurement Personnel

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### Risk Management

#### Learn How To:

- Use a practical, eight-step process to manage project risk
- Identify threats and opportunities and weigh their relative value in your project
- Control multiple risks using limited strategies
- Overcome psychological barriers to risk in stakeholders and team members
- Make risk and opportunity integral components of your next project plan

#### Course Description:

Too often, risk management is seen as reactive, or worse, unresponsive. Nothing could be further from the truth. In this course, you'll work through the proactive approach to threat and opportunity—based on a clear understanding of the powerful nature of both qualitative and quantitative approaches to risk management.

This course examines threat and opportunity from both a top-down and bottom-up perspective using a proven eight-step risk management process. Using effective tools, including a highly regarded risk assessment model, you'll learn how to evaluate and respond to risk at the project and task levels. Included in the course is a multi-part case study that takes you from a risk overview at the beginning of a project through the challenges of ongoing assessment and reassessment of threats and opportunities throughout the project. You'll end the course with new practices to apply in your environment and new insights on the implications and advantages of applying risk management well.

**DATE:** May 15 – 17, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

### Scheduling and Cost Control

#### Learn How To:

- Use the work breakdown structure to develop a network diagram
- Calculate schedules using PERT/CPM
- Identify, assign, and tabulate resource requirements
- Predict costs and work time using specific levels and estimate types
- Plan for contingencies and anticipate variations
- Predict future project performance based on historical data
- Monitor changes and close out projects on time

#### Course Description:

Develop effective measures for scheduling and controlling projects as you put the tools of project management to work. In this course you'll focus on managing the constraints you face in any project: limits on time, human resources, materials, budget, and specifications. Discover proven ways to work within your identified constraints, without letting predefined limits curtail creativity or innovation.

From the opening morning, you'll get hands-on experience, practicing your skills in building project requirements and the work breakdown structure. You'll learn a sound, logical framework for scheduling and controlling project activities. And you'll master techniques for estimating, forecasting, budgeting, monitoring, controlling, analyzing, and reporting costs and interpreting the meaning of earned-value data. Individual and small-group exercises feature scenarios that help hone these skills, and a comprehensive toolkit provides practical field guidance. Discover a number of sophisticated tools and techniques that you can use to manage time and costs effectively on every type of project. **Recommendation:** Please bring a calculator to class.

**DATE:** April 9 – 13, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None



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## **Business Analysis Courses for Treasury Procurement Personnel**

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### **Business Object Oriented Modeling**

#### **Learn How To:**

- Apply many concepts of Object Orientation (OO) as they relate to business analysis
- Use a step-by-step methodology for applying OO modeling techniques to the activities of a project
- Leverage the value of OO and UML techniques by applying them early in a project
- Investigate and document business process and systems behavior using OO and UML
- Eliminate inconsistencies in the business requirements documentation using inheritance, encapsulation and other UML techniques

#### **Course Description:**

As projects become more and more complex, they continually push the boundaries of the obscure and the unknown. Object orientation (OO) is not just for programming and coding. At a conceptual level, it is changing the way we look at projects by having us view the project, the product or the process in terms of groups of items and processes that have specific properties called objects.

This course provides the participant with a solid introduction to the language of object-oriented modeling, known as Unified Modeling Language (UML) and a view of this requirements elicitation technique through the eyes of the business analyst, not the systems analyst. UML is very useful in identifying and documenting the current processes (AS-IS) and the future processes (TO-BE), regardless of whether it is for a manual process or an IT solution. It will also help identify what other roles and systems (actors) and processes may change due to the outcome of the project. This course enables organizations to fully exploit the potential of object-oriented modeling by using it early in the project life cycle when the analysis of the business, the users, and the “who and what” are involved is being accomplished.

**DATE:** April 16 – 19, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

### **How to Gather & Document User Requirements**

#### **Learn How To:**

- Define the role of the business analyst in the requirements process
- Structure a Business Requirements Document
- Effectively document a project's vision and scope
- Identify user classes and define their environment
- Develop a Requirements Analysis Work Plan
- Define, elicit, structure, validate and document business requirements
- Link the Business Requirements Document to a Software Requirements Specification

#### **Course Description:**

Incomplete requirements are often cited as the number-one reason projects or systems fail. Accurately defining the requirements and staying on course from the beginning is the key to success in today's business world.

This “how-to” course introduces the roles of the business analyst as they relate to the analysis and documentation of requirements. It familiarizes participants with core knowledge and skills required to analyze and document user requirements. It also identifies how these requirements are defined and managed throughout the life cycle.

**DATE:** March 5 – 8, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

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## Business Analysis Courses for Treasury Procurement Personnel

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### Introduction to Business Analysis

#### Learn How To:

- Define the role of the business analyst throughout the phases of a project
- Explain the range of tasks that a business analyst might perform
- Apply principles of quality assurance and testing
- Explain the importance of requirements definition
- Assess the value of use case analysis and design on your work
- Explain how business process, workflow and data modeling techniques facilitate improved communication

#### Course Description:

The business analyst's role is the key to defining the requirements of a project at its earliest stages, as well as to planning, defining and validating project scope. It's important to have an understanding of the breadth of knowledge that a business analyst brings to bear in developing business solutions.

This introductory course is designed to give you a basic understanding of the benefits, functions and impact of this critical position. You'll experience how a business analyst supports the project, from establishing its scope in the analysis phase to ensuring the requirements have been met in the testing phase. The course provides a special focus on the business analysis function as it relates to developing information technology solutions, given that such an understanding is essential for project success.

After completing this course, you'll understand why and when to involve the business analysis function. Plus, you'll have a working vocabulary to enable you to communicate effectively with those who perform that role.

**DATE:** February 27, 2007 – March 1, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

### Introduction to Testing for Business Analysis

#### Learn How To:

- Create test cases and test scenarios using data, process and workflow models
- Select the right technique to make testing efficient
- Create testing strategies and test plans for high-order testing based on business and user requirements
- Plan and coordinate usability testing
- Conduct reviews and inspections
- Manage problems in a structured way

#### Course Description:

Test plans should not be left for last!

Failure to develop a plan to test the right things at the right time can result in cost overruns, missed completion dates, undetected errors and dissatisfaction among customers and users.

In this course, you'll learn the necessary skills to construct effective test strategies and test plans to verify and validate requirements—enabling you to deliver the quality your business demands. You will also be able to communicate the rationale for and value of planning and conducting the various necessary reviews and inspections. You'll gain an understanding of black box and glass box (white box) testing from a business analyst's perspective—and you'll know how to communicate with those who perform the systems analyst function.

**DATE:** May 15 – 17, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

## **Business Analysis Courses for Treasury Procurement Personnel**

### **Logical Data & Process Modeling**

#### **Learn How To:**

- Create more accurate and complete requirements
- Use diagramming to communicate project scope
- Create a data model to define and describe project requirements
- Create and use functional decomposition diagrams, entity relationship diagrams and dataflow diagrams
- Use dataflow diagrams to validate data and process models

#### **Course Description:**

In today's complex business environment, integration of multiple functional areas combined with fuzzy requirements is a fact of life—a picture is truly worth a thousand words. The techniques used in logical data and process modeling focus on presenting a complete picture of the important requirements of the business (and the related project) through significant user involvement in the analysis phase.

This course provides techniques for effectively analyzing and modeling any area of your business and creating logical data and process models that show how data flows and work progresses. The approaches taught in this class are designed to focus the attention on the important requirements of the business that are discovered through significant user involvement during the analysis phase.

Participants will learn how to create models without being limited by technology or organizational structure. The course exercises are designed to reinforce the techniques taught in class—entity relationship diagramming, functional decomposition diagramming and dataflow diagramming.

**DATE:** March 26 – 30, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

### **Workflow Modeling**

#### **Learn How To:**

- Create workflow diagrams using various proven techniques
- Determine which workflow modeling technique is best suited for your project
- Find opportunities for process improvement using workflow models
- Validate workflow models to ensure their accuracy and completeness
- Use six proven enablers to improve processes

#### **Course Description:**

To develop a complete picture of the important requirements to support the business, the next critical step is documenting the flow of work, as it currently exists. Only then can you move forward to design the solution to support the business needs. The workflow model defines and diagrams “how” an organization performs its essential business activities.

The workflow model uses the Logical Process Model as the basis for diagramming each process as a workflow. These diagrams explain each activity and its interactions in detail, including how it is triggered, what resources are needed and what deliverables will be created. This knowledge will enable you to discover and address any unstated requirements prior to finalizing the project plan. These workflow diagrams are keys to effective analysis and communications.

Participants will learn how to diagram current operating procedures (AS-IS) and look for areas of improvement (TO-BE). You will be prepared to construct and analyze the workflow diagrams, identify opportunities for process improvements and modify workflow to reflect these new improvements.

**DATE:** April 3 – 4, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None



## **Personal Development Courses for Treasury Procurement Personnel**

### **Mastering the Art of Business Communications**

#### **Course Description:**

Are you looking for new ways to communicate to your co-workers and employees, increase your productivity and advance your career? Are you communicating to make the right visual, vocal and verbal impact? This two-day course is filled with information to become a better communicator. Nothing can be achieved without the combined cooperation, commitment and action of people. That's why your interpersonal skills are so critical to your own effectiveness and performance boosting your productivity and promote-ability.

Communication with colleagues is no longer just a matter of having a good working relationship. Today, successful communication has become a business imperative and an ingredient for success. It's the art of savvy business interaction. This course is for those who want to master the keys to communication for handling any communication situation with greater flexibility, confidence and professional presence. The course covers developing communication skills that will help foster collaborative relationships in the workplace. This includes identifying factors that can lead to conflict, positively influence others and develop skills to become flexible in your actions, thoughts and feelings to better handle any situation.

#### **Course Topics:**

- Give clear instructions and motivate others
- Use successfully-proven communication techniques to get your message across
- Listen actively to your advantage
- Understand and use the power of body language
- Increase your effectiveness when speaking in public
- Give and receive criticism for positive change
- Understand the varying communication styles of men and women
- Learn the keys to communicating in the workplace
- Talk your way to success

**DATES:** January 23 – 24, 2007  
May 1 – 2, 2007  
July 17 – 18, 2007

**LOCATION:** TAI – Oxon Hill, MD

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

### **Research Skills for the Real World – Going Beyond Google**

#### **Course Description:**

This introductory research-skills course gives an overview of online searching and telephone and email research and is designed for anyone who must provide research for any organization, be it agency, association, business, elected official or nonprofit. *Research Skills for the Real World, Going Beyond Google* includes a review of legislative, judicial, regulatory, factual, and international research. Public and private information sources are reviewed, and you will walk away with a wealth of knowledge and resources to use in your workplace. Topics include:

**Search Techniques** - What are Google and other search engines good for & keys to finding and selecting other resources available beyond Google; On-line search tips;

**Federal Legislative Sources** - How a bill becomes a law and the primary documents generated along the way; Review sources for Public Laws, Statutes at Large, US Code

**Courts and Judicial Sources** - Demonstration of primary sources and discussion of commercial resources; Limitations of free Web resources for legal research; legal research & the structure of a decision

**Federal Agencies, Administrative and Regulatory Sources** - The regulatory process and corresponding documents; Finding the best tools within the agencies; Demonstration of primary sources: The Federal Register, CFR; Administrative Law; OMB

**Identifying Information Sources** - How private research sources differ from government research sources; Tapping into information from state government information resources, think tanks, policy shops, trade associations, etc; Locating international organizations on the web and where to start your research

**People Interviewing Tips** - Email vs. phone; Who can you call? What can you expect?; Respect your sources

**DATES:** November 8, 2006  
January 4, 2007  
March 29, 2007  
April 5, 2007  
May 3, 2007  
July 18, 2007

**LOCATION:** TAI – Oxon Hill, MD

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

## **Personal Development Courses for Treasury Procurement Personnel**

### **Simply Grammar**

#### **Course Description:**

Have you experienced the embarrassment of having your grammar corrected; would you like to correct other people's grammar; and finally, would you like to project confidence and present a more polished, professional image? Some of the most fundamental grammatical problems can baffle even the most intelligent people. Here's an intensive two-day course focusing on grammar, punctuation and basic English composition.

This course demystifies grammar by outlining "must-know" grammar rules no professional can do without. Other topics include: making your communications "lean and mean," avoiding sexism in your writing and speaking, limiting adjectives for more powerful communications and avoiding the glaring "singular or plural" errors most people make. The theme of the course is how to make both your verbal and written communications easily understood. Be a take charge communicator. Lose your anxiety over writing and grammar! And best of all you will take home a valuable, college text desk reference. By the end of the course, you will be able to identify and avoid common mistakes in grammar and usage, and increase the impact, clarity and overall effectiveness of your verbal communications and written products by following the basic guidelines of grammar and word usage.

#### **Course Topics:**

- Use standard English in written and oral communications
- Use the correct form of verbs and "tricky" pronouns
- Avoid duplication in your writing and write succinctly
- Use punctuation correctly
- Polish your writing by avoiding offensive mistakes

**DATES:** December 11 – 12, 2006  
March 12 – 13, 2007  
May 14 – 15, 2007  
July 9 – 10, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

### **The Seven Habits of Highly Effective People**

#### **Course Description:**

This course is an intensive, three-day workshop that provides participants with a robust and tactical implementation plan to fully integrate The 7 Habits into their lives. Designed for anyone looking to become a more effective person—regardless of your occupation, position, or stage in life.

#### **What You Learn:**

- How to improve focus, communication, and balance for yourself and your organization
- How to develop professional relationships for productive collaboration
- The importance of responsibility, accountability, and commitment
- Skills for increasing productivity by staying focused on the right things
- How to reduce conflict by understanding exactly what you can influence

#### **What You Receive:**

- The 7 Habits of Highly Effective People Book - This best-selling book provides the basis for the concepts taught in this course.
- Participant Guidebook - This 174-page manual is filled with examples and exercises that continue to enhance the learning process after the workshop is over.
- The 7 Habits Seven-Week Contract Book.

**DATES:** March 20 – 22, 2007  
June 19 – 21, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

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## Personal Development Courses for Treasury Procurement Personnel

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### Write 2 the Point

#### **Course Description:**

More energy is wasted on worthless writing - in both creating and reviewing it - than just about any other business activity. Fortunately, good writing can be easy with this course which lays the foundation for writing more precise and direct correspondence, documents, reports, etc. The theme of the course is how to make your written communications straight-forward, credible and easily understood.

Many people who have no trouble getting their point across when speaking have nothing but trouble when putting pen to paper. Your words on their own must capture your reader's attention and convey your meaning - quickly and accurately. Stressing conciseness, clarity and good organization in correspondence, this course is lively, informative and practices what it preaches. The manual is a useful guide of key points and rules that makes correct structure easy and painless. By the end of the course, you will be able to write more effectively with less effort by applying the principles in the step-by-step process for effective writing.

#### **Course Topics**

- Use the prescribed basic steps for more effective writing
- Overcome "poor writing" tendencies
- Determine your goal in writing
- Organize your thoughts
- Overcome writer's block
- Revise your material
- Develop on-target paragraphs
- Write dynamic products with powerful word choice
- Critique and edit the work of others

**DATES:** December 13 – 14, 2006  
March 14 – 15, 2007  
May 16 – 17, 2007  
July 11 – 12, 2007

**LOCATION:** TAI – Oxon Hill, MD

**COURSE FORMAT:** Lecture, discussion, case studies, and practical exercises

**AUDIENCE:** Treasury Procurement Personnel

**PREREQUISITE:** None

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**FY 2007 Alphabetical Listing of Course Offerings**

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## FY 2007 Monthly Schedule of Course Offerings

| Start Date           | End Date | COURSE TITLE   |
|----------------------|----------|--|
| <b>OCTOBER 2006</b>  |          |  |
| 10/03/06             | 10/03/06 | Supply/Market/Industry Analysis                          |
| 10/04/06             | 10/04/06 | Commodity Strategy Development                           |
| 10/16/06             | 10/20/06 | CON 110: Mission Support Planning                        |
| 10/16/06             | 10/20/06 | Contracting Officer's Representative Training (COTR)     |
| 10/30/06             | 11/03/06 | Contracting Officer's Representative Training (COTR)     |
| <b>NOVEMBER 2006</b> |          |  |
| 11/07/06             | 11/09/06 | Managing Projects  |
| 11/08/06             | 11/08/06 | Research Skills for the Real World - Going Beyond Google |
| 11/13/06             | 11/17/06 | Contracting Officer's Representative Training (COTR)     |
| 11/14/06             | 11/16/06 | Project Leadership, Mgmt and Communications              |
| <b>DECEMBER 2006</b> |          |  |
| 12/04/06             | 12/08/06 | Contracting Officer's Representative Training (COTR)     |
| 12/05/06             | 12/06/06 | GWACs, IDIQ Contracts, and Schedules                     |
| 12/05/06             | 12/07/06 | Strategic Business Advisor                               |
| 12/11/06             | 12/12/06 | Simply Grammar   |
| 12/12/06             | 12/13/06 | Incentive Contracts                                      |
| 12/13/06             | 12/14/06 | Write 2 the Point  |
| <b>JANUARY 2007</b>  |          |  |
| 01/02/07             | 01/04/07 | Leading Complex Projects                                 |
| 01/04/07             | 01/04/07 | Research Skills for the Real World - Going Beyond Google |
| 01/08/07             | 01/12/07 | Contracting Officer's Representative Training (COTR)     |
| 01/09/07             | 01/11/07 | Managing IT Projects                                     |
| 01/09/07             | 01/11/07 | Vendor Selection: A Collaborative Approach               |
| 01/16/07             | 01/19/07 | Managing Cost-Reimbursement Contracts                    |
| 01/17/07             | 01/18/07 | Overview of Government Contracting                       |
| 01/17/07             | 01/18/07 | Task Order Contracting                                   |
| 01/22/07             | 01/26/07 | CON 100: Shaping Smart Business Arrangements             |
| 01/22/07             | 02/02/07 | CON 120: Mission Focused Contracting                     |
| 01/23/07             | 01/24/07 | Mastering the Art of Business Communications             |
| 01/29/07             | 01/31/07 | Seven Steps to Performance-Based Acquisition             |
| 01/30/07             | 02/01/07 | Quality for Project Managers                             |
| <b>FEBRUARY 2007</b> |          |  |
| 02/01/07             | 02/02/07 | Six Disciplines of Performance-Based Management          |
| 02/05/07             | 02/09/07 | Contracting Officer's Representative Training (COTR)     |
| 02/05/07             | 02/16/07 | CON 202: Intermediate Contracting                        |
| 02/06/07             | 02/08/07 | Managing Outsourcing Contracts                           |
| 02/12/07             | 02/16/07 | CON 111: Mission Strategy Execution                      |
| 02/13/07             | 02/15/07 | Managing Global Projects                                 |
| 02/20/07             | 02/22/07 | IT Risk Management                                       |
| 02/20/07             | 02/22/07 | Strategic Business Advisor                               |
| 02/21/07             | 02/22/07 | Contract Closeout  |
| 02/27/07             | 02/28/07 | GWACs, IDIQ Contracts, and Schedules                     |
| 02/27/07             | 03/01/07 | Introduction to Business Analysis                        |



## FY 2007 Monthly Schedule of Course Offerings

| Start Date        | End Date | COURSE TITLE   |
|-------------------|----------|--|
| <b>MARCH 2007</b> |          |  |
| 03/05/07          | 03/08/07 | Advanced Source Selection                                |
| 03/05/07          | 03/08/07 | How to Gather and Document User Requirements             |
| 03/05/07          | 03/09/07 | Contracting Officer's Representative Training (COTR)     |
| 03/12/07          | 03/13/07 | Simply Grammar   |
| 03/12/07          | 03/15/07 | Federal Appropriations Law                               |
| 03/13/07          | 03/15/07 | COTR Management of IT Services Contracts                 |
| 03/14/07          | 03/15/07 | Write 2 the Point  |
| 03/19/07          | 03/21/07 | Seven Steps to Performance-Based Acquisition             |
| 03/20/07          | 03/22/07 | Systems Integration Project Management                   |
| 03/20/07          | 03/22/07 | The Seven Habits of Highly Effective People              |
| 03/22/07          | 03/23/07 | Six Disciplines of Performance-Based Management          |
| 03/26/07          | 03/30/07 | Logical Data and Process Modeling                        |
| 03/26/07          | 04/06/07 | CON 204: Intermediate Contract Pricing                   |
| 03/27/07          | 03/28/07 | Contract Disputes and Terminations                       |
| 03/27/07          | 03/29/07 | Financial Management for Project and Contract Mgrs       |
| 03/29/07          | 03/29/07 | Research Skills for the Real World - Going Beyond Google |
| <b>APRIL 2007</b> |          |  |
| 04/02/07          | 04/06/07 | Contracting Officer's Representative Training (COTR)     |
| 04/03/07          | 04/04/07 | Workflow Modeling  |
| 04/03/07          | 04/05/07 | Negotiation Skills for Project Managers                  |
| 04/05/07          | 04/05/07 | Research Skills for the Real World - Going Beyond Google |
| 04/09/07          | 04/13/07 | Scheduling and Cost Control                              |
| 04/09/07          | 04/20/07 | CON 202: Intermediate Contracting                        |
| 04/10/07          | 04/12/07 | Simplified Acquisition                                   |
| 04/16/07          | 04/19/07 | Business Object Oriented Modeling                        |
| 04/16/07          | 04/20/07 | CON 210: Government Contract Law                         |
| 04/23/07          | 04/23/07 | Strategic Sourcing Overview                              |
| 04/23/07          | 04/25/07 | Network and Telecom Principles for PMs                   |
| 04/23/07          | 04/25/07 | Strategic Business Advisor                               |
| 04/24/07          | 04/24/07 | Supply/Market/Industry Analysis                          |
| 04/25/07          | 04/25/07 | Commodity Strategy Development                           |
| 04/30/07          | 05/04/07 | Earned Value Management Fundamentals                     |
| 04/30/07          | 05/04/07 | Contracting Officer's Representative Training (COTR)     |
| <b>MAY 2007</b>   |          |  |
| 05/01/07          | 05/02/07 | Mastering the Art of Business Communications             |
| 05/03/07          | 05/03/07 | Research Skills for the Real World - Going Beyond Google |
| 05/07/07          | 05/11/07 | CON 112: Mission Performance Assessment                  |
| 05/07/07          | 05/11/07 | Contracting Officer's Representative Training (COTR)     |
| 05/08/07          | 05/10/07 | Requirements Management: A Key to Project Success        |
| 05/14/07          | 05/15/07 | Simply Grammar   |
| 05/15/07          | 05/17/07 | Introduction to Testing for Business Analysis            |
| 05/15/07          | 05/17/07 | Risk Management  |
| 05/16/07          | 05/17/07 | Write 2 the Point  |
| 05/21/07          | 05/23/07 | Seven Steps to Performance-Based Acquisition             |
| 05/21/07          | 05/24/07 | Managing Cost-Reimbursement Contracts                    |
| 05/21/07          | 05/25/07 | Contracting Officer's Representative Training (COTR)     |
| 05/24/07          | 05/25/07 | Six Disciplines of Performance-Based Management          |



## FY 2007 Monthly Schedule of Course Offerings

| Start Date            | End Date | COURSE TITLE   |
|-----------------------|----------|--|
| <b>JUNE 2007</b>      |          |  |
| 06/04/07              | 06/15/07 | CON 353: Advanced Business Solutions for Mission Support |
| 06/04/07              | 06/15/07 | CON 204: Intermediate Contract Pricing                   |
| 06/04/07              | 06/08/07 | Contracting Officer's Representative Training (COTR)     |
| 06/05/07              | 06/07/07 | Strategic Business Advisor                               |
| 06/12/07              | 06/13/07 | Overview of Government Contracting                       |
| 06/19/07              | 06/21/07 | The Seven Habits of Highly Effective People              |
| 06/25/07              | 06/29/07 | Contracting Officer's Representative Training (COTR)     |
| 06/26/07              | 06/26/07 | Strategic Sourcing Overview                              |
| 06/27/07              | 06/27/07 | Supply/Market/Industry Analysis                          |
| 06/28/07              | 06/28/07 | Commodity Strategy Development                           |
| <b>JULY 2007</b>      |          |  |
| 07/09/07              | 07/10/07 | Simply Grammar   |
| 07/09/07              | 07/13/07 | Contracting Officer's Representative Training (COTR)     |
| 07/11/07              | 07/12/07 | Write 2 the Point  |
| 07/17/07              | 07/18/07 | Mastering the Art of Business Communications             |
| 07/18/07              | 07/18/07 | Research Skills for the Real World - Going Beyond Google |
| 07/24/07              | 07/26/07 | Strategic Business Advisor                               |
| <b>AUGUST 2007</b>    |          |  |
| 08/06/07              | 08/08/07 | Seven Steps to Performance-Based Acquisition             |
| 08/06/07              | 08/17/07 | CON 353: Advanced Business Solutions for Mission Support |
| 08/09/07              | 08/10/07 | Six Disciplines of Performance-Based Management          |
| 08/13/07              | 08/17/07 | Contracting Officer's Representative Training (COTR)     |
| 08/20/07              | 08/24/07 | Contracting Officer's Representative Training (COTR)     |
| <b>SEPTEMBER 2007</b> |          |  |
| 09/10/07              | 09/14/07 | Contracting Officer's Representative Training (COTR)     |



Internal Revenue Service  
Constellation Centre  
6009 Oxon Hill Road, Oxon Hill, Maryland 20745  
Phone: (202) 283-1292

## COURSE REGISTRATION FORM

**To Register:** Complete all information and have your supervisor sign form. Completed form can either be mailed to TAI at the address above, faxed to (202) 283-1130 or emailed to Donald.I.Guy@irs.gov. If emailing, please use an Adobe PDF document that shows the supervisor's approval (signature) on the course registration form. **PLEASE TYPE or PRINT NEATLY**

NAME: \_\_\_\_\_

>> EMAIL ADDRESS: \_\_\_\_\_ <<

TITLE: \_\_\_\_\_ SERIES/GRADE: \_\_\_\_\_ SEID: \_\_\_\_\_

WORK PHONE #: \_\_\_\_\_ HOME PHONE #: \_\_\_\_\_

FAX PHONE #: \_\_\_\_\_

In case of emergency, please notify: \_\_\_\_\_ (Name/Number)

SUPERVISOR'S NAME/PHONE #: \_\_\_\_\_

>> SUPERVISOR'S SIGNATURE: \_\_\_\_\_ <<

DEPARTMENT: \_\_\_\_\_

AGENCY: \_\_\_\_\_

OFFICE SYMBOLS: \_\_\_\_\_

TRAINING COORDINATOR'S EMAIL ADDRESS: \_\_\_\_\_

COURSE TITLE: \_\_\_\_\_

DATE OF COURSE: \_\_\_\_\_ ALTERNATE DATE IF CLASS IS FULL: \_\_\_\_\_

### CONFIRMATION INFORMATION

(For TAI Staff Use Only)

The following information has been confirmed for your class unless otherwise notified by a member of the TAI Staff

#### Course Time

8:30 am to 4:00 pm

#### Course Location

TAI, Constellation Centre, Oxon Hill, MD

#### 1<sup>st</sup> Floor

- ☐ Room 103  
☐ Room 104  
☐ Room 110

#### 7<sup>th</sup> Floor

- ☐ Room 725B  
☐ Room 726A

Location is subject to change

TAI Staff Approval \_\_\_\_\_

### TAI STAFF

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Management Analyst  
(202) 283-1422

### TAI Cancellation Policy



If TAI has to cancel a course for administrative reasons, we will make every effort to notify all confirmed participants. When we contact you, we will be happy to discuss enrolling you in a future session.

### Student Withdrawal Policy

If you are unable to attend a class, please send us a note with your supervisor's signature **two weeks** before the class start date.

No shows will result in agency being charged for course.

### Reasonable Accommodations

If you have special needs (i.e. interpreter), please list them here:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_